Organization Administrator: Maintain Department/Locations

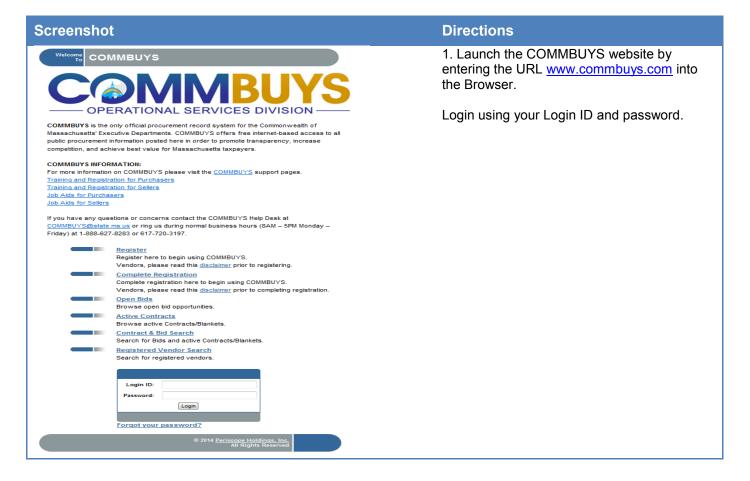**This Job Aid shows how to:**

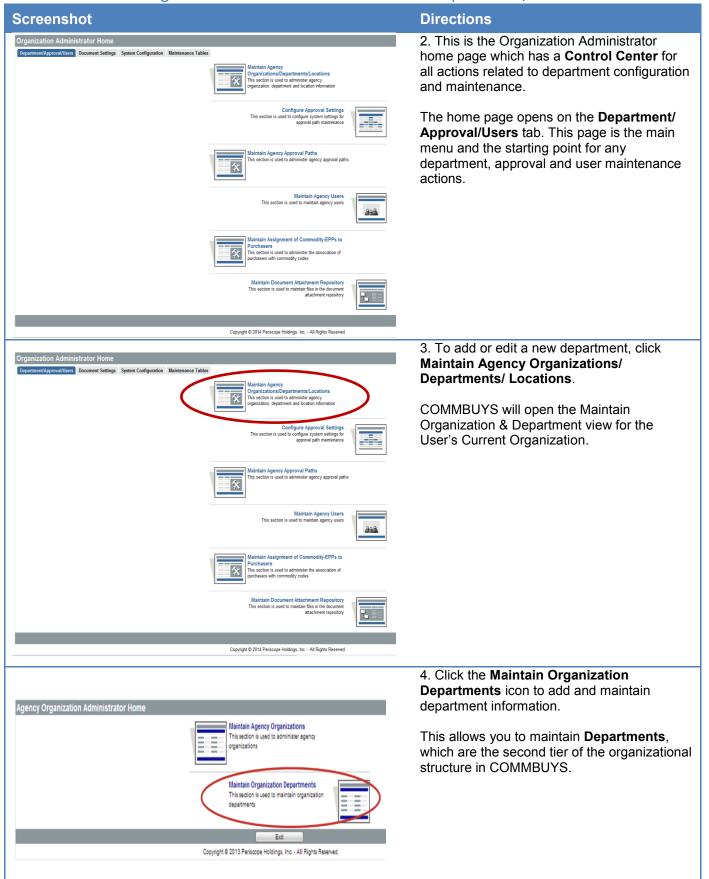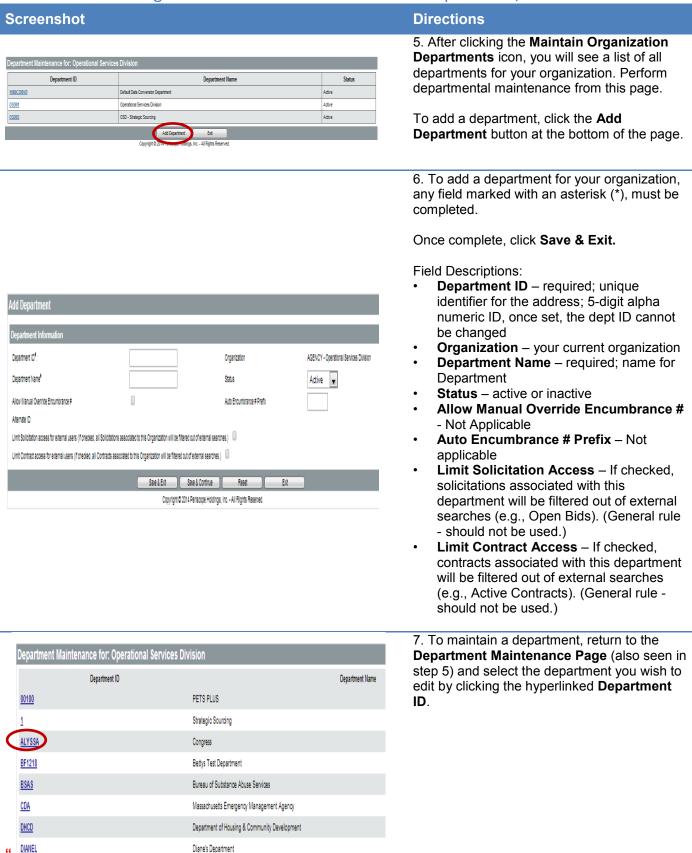- Create and Maintain departments and locations in COMMBUYS

Of Special Note:

Departments and locations are entered into the system by the Organization Administrator (OA) after discussion with the Agency Chief Procurement Officer, Chief Fiscal Officer and COMMBUYS liaisons. Thought and structure must be developed or known to ensure organization structure is established properly. Organization Administrators maintain the departments, locations, users and approval paths for their organization in COMMBUYS. The set-up options available for Organization Administrators in COMMBUYS provide systematic control of the end-to-end procurement process, including document creation rights, viewing privileges and user workflow within their organization. NOTE: A department and a location must be assigned prior to adding agency users. If your organization does not have a department and a location, you can duplicate your Organization (and or Department) information to satisfy that requirement.

Screenshot	Directions
	1. Launch the COMMBUYS website by entering the URL www.commbuys.com into the Browser. Login using your Login ID and password.

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Screenshot	Directions
	2. This is the Organization Administrator home page which has a **Control Center** for all actions related to department configuration and maintenance. The home page opens on the **Department/ Approval/Users** tab. This page is the main menu and the starting point for any department, approval and user maintenance actions.
	3. To add or edit a new department, click **Maintain Agency Organizations/ Departments/ Locations**. COMMBUYS will open the Maintain Organization & Department view for the User's Current Organization.
	4. Click the **Maintain Organization Departments** icon to add and maintain department information. This allows you to maintain **Departments**, which are the second tier of the organizational structure in COMMBUYS.

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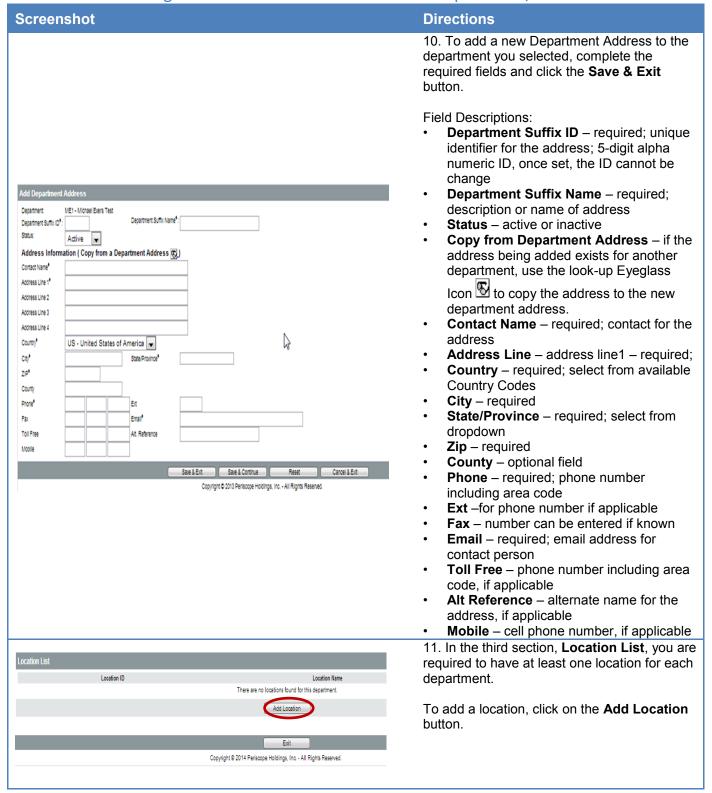| Screenshot	Directions
	5. After clicking the **Maintain Organization Departments** icon, you will see a list of all departments for your organization. Perform departmental maintenance from this page. To add a department, click the **Add Department** button at the bottom of the page.
	6. To add a department for your organization, any field marked with an asterisk (*), must be completed. Once complete, click **Save & Exit.** Field Descriptions: • **Department ID** – required; unique identifier for the address; 5-digit alpha numeric ID, once set, the dept ID cannot be changed • **Organization** – your current organization • **Department Name** – required; name for Department • **Status** – active or inactive • **Allow Manual Override Encumbrance #** - Not Applicable • **Auto Encumbrance # Prefix** – Not applicable • **Limit Solicitation Access** – If checked, solicitations associated with this department will be filtered out of external searches (e.g., Open Bids). (General rule - should not be used.) • **Limit Contract Access** – If checked, contracts associated with this department will be filtered out of external searches (e.g., Active Contracts). (General rule - should not be used.)
	7. To maintain a department, return to the **Department Maintenance Page** (also seen in step 5) and select the department you wish to edit by clicking the hyperlinked **Department ID**.

Screenshot	Directions
	8. This page is broken up into three sections. Department Information, Department Address List and Department Location List. In the first section titled, **Department Information**, you are able to edit the Department name and status.
	9. In the second section titled, **Department Address List**, all addresses within your department may be added or edited. To add a department address click on **Add Dept. Address**.

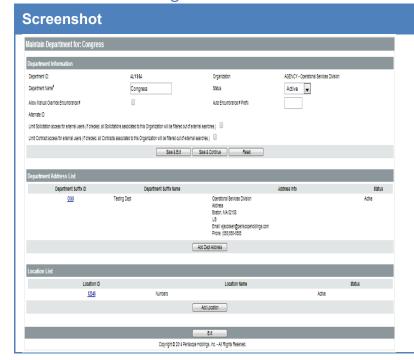| Screenshot	Directions
Add Department Address Department: ME1 - Michael Evers Test Department Suffix ID*: Department Suffix Name*: Status: Active Address Information (Copy from a Department Address) Contact Name* Address Line 1* Address Line 2 Address Line 3 Address Line 4 Country* US - United States of America City* State/Province* Zip* County Phone* Ext Fax Email* Toll Free Alt. Reference Mobile Save & Exit Save & Continue Reset Cancel & Exit Copyright © 2013 Periscope Holdings, Inc. - All Rights Reserved.	10. To add a new Department Address to the department you selected, complete the required fields and click the **Save & Exit** button. Field Descriptions: • **Department Suffix ID** – required; unique identifier for the address; 5-digit alpha numeric ID, once set, the ID cannot be change • **Department Suffix Name** – required; description or name of address • **Status** – active or inactive • **Copy from Department Address** – if the address being added exists for another department, use the look-up Eyeglass Icon to copy the address to the new department address. • **Contact Name** – required; contact for the address • **Address Line** – address line1 – required; • **Country** – required; select from available Country Codes • **City** – required • **State/Province** – required; select from dropdown • **Zip** – required • **County** – optional field • **Phone** – required; phone number including area code • **Ext** –for phone number if applicable • **Fax** – number can be entered if known • **Email** – required; email address for contact person • **Toll Free** – phone number including area code, if applicable • **Alt Reference** – alternate name for the address, if applicable • **Mobile** – cell phone number, if applicable
Location List Location ID Location Name There are no locations found for this department. Add Location Exit Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	11. In the third section, **Location List**, you are required to have at least one location for each department. To add a location, click on the **Add Location** button.

Screenshot	Directions

12. **Locations** are the lowest level of the organization structure. Locations are typically used for managing approval paths, default addresses, and Purchaser assignment.

Once complete click **Save & Exit**

Add Location fields include:
- **Location ID** –5-digit alpha numeric ID; once set, it cannot be changed; 5-digit alpha numeric ID, once set ID cannot be changed
- **Department** – select department from the drop-down list
- **Location Name** – required
- **Status** – Active, Deleted, Inactive, Pending
- **Location Type** – options: Department Access, Central Receiving, Inventory, Inventory and Central Receiving
- **Purchaser** – select from the drop-down
- **Ship-to Department Address** – choose a destination address
- **Bill-to Department Address** – choose a bill-to address
- **Account Filter** – Phase II
- **Email To** – select a user from the drop-down list for notification purposes
- **Allow PO Receipt Variance** – controls if PO Receipt Variances are allowed
    - PO Receipt Quantity Variance Percentage (0.0% means no limit) - % option to preset an amount of variance in the items received
    - PO Receipt Dollar Variance ($0.00 means no limit) - same as above, using the dollar amount as the qualifier instead of quantity
- **Specify Purchaser Allowed** – allows the selection of a specific purchaser for the location, all documents created by this location will default to that purchaser
- **Limit Solicitation Access** – controls if solicitations associated with this location will be filtered out of external searches (e.g., Open Bids)
- **Limit Contract Access** – controls if contracts associated with this location will be filtered out of external searches (e.g., Active Contracts)

Screenshot	Directions
Maintain Department for: Congress **Department Information** Department ID: ALYSSA Organization AGENCY - Operational Services Division Department Name* Congress Status Active Allow Manual Override Encumbrance # ☐ Auto Encumbrance # Prefix Alternate ID Limit Solicitation access for external users (if checked, all Solicitations associated to this Organization will be filtered out of external searches.) ☐ Limit Contract access for external users (if checked, all Contracts associated to this Organization will be filtered out of external searches.) ☐ Save & Exit Save & Continue Reset **Department Address List** Department Suffix ID Department Suffix Name Address Info Status OSS Testing Dept Operational Services Division Address Boston, MA 02108 US Email: ejacobsen@periscopeholdings.com Phone: (555) 555-5555 Active Add Dept Address **Location List** Location ID Location Name Status 12345 Numbers Active Add Location Exit Copyright © 2014 Periscope Holdings, Inc - All Rights Reserved.	13. You are able to add as many departments, department addresses and locations as desired (there is no quantity restriction). Once you are finished adding the department addresses and locations to your department; click **Exit** on the bottom of this screen shot to return to the Departments page.